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
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DSSD CENSUS 2000 PROCEDURES AND OPERATIONS MEMORANDUM SERIES # G-19

MEMORANDUM FOR Michael Longini
Chief, Decennial Systems and Contract
Management Office

Attention: Decennial Design, Policy and Management Branch

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Subject: Observation Report of Quality Assurance Representative Field Trial,
Telephone Questionnaire Assistance operation, at the National
Processing Center

I. INTRODUCTION

A dress rehearsal for the quality assurance representative (QAR) training of the Telephone Questionnaire Assistance (TQA) operation was held at the National Processing Center (NPC) from December 13 to 16, 1999. The QARs monitor the service of the agents, the people answering the phone at the call centers. They assess conformance to the quality standards. Approximately six people assumed the roles of QARs. Three instructors covered the program in the latest draft of the training manual.

Attending as observers were personnel from the Decennial Systems and Contract Management Office (DSCMO), Decennial Statistical Studies Division (DSSD), Electronic Data Systems (EDS), and Precision Response Corporation (PRC). The EDS is the prime contractor for the TQA operation. The PRC is a subcontractor with responsibility for managing several of the call centers which will be used.

The QAR field trial was well received by the trainees. It was well run overall. Several useful suggestions on revising the training materials were obtained.

II. COMMENTS

The class covered AutoFocus. AutoFocus is the software containing the electronic evaluation form filled out by the QARs when they monitor agents. No microphone was available for the instructors because the one available was needed by another class going on at the same time. It had a larger enrollment than the QAR class. Also, there was no printer available for some of the practice exercises.

The QAR class was a combination of lectures and simulations. Trainees took turns practicing the roles of agents and QARs. Extensive use was made of verbatim excerpts from the operator support system (OSS). The class read these out loud in many simulations. This captured the feel of serving a live customer in the TQA operation.

The instructors and PRC support people took time to check the understanding of the AutoFocus program by the QARs. A glitch involving the computer monitors prevented some of the dates of available reports from being seen.

The third day of class started with a fun exercise. Each QAR listed four personal facts, one which not supposed to be true. The other QARs had to guess which of a set of four facts was the false one. The instructors dwelt on the role of the QARs: to make sure the agent is doing the job, to act as a team leader, and to coach agents. The major goal of the QAR function is to move the agents to the accomplished level. At the accomplished level, monitoring is reduced from three sessions for each 45 minutes of calls to one session.

The objectives of monitoring and calibration were discussed next. The QARs admitted that without monitoring there is no way to know how the agents are doing. It is expected the agents will feel nervous and awkward about being monitored, at least in the beginning. One of the QARs expressed uneasiness about having to mark an agent negatively on some aspect of performance.

Calibration sessions are used to insure that the QARs give the agents consistent messages. In a calibration session, an agent supervisor leads. All QARs participate a minimum of once per week. Sessions run approximately one hour. The QARs listen to a tape of the same call. They score the agent's performance. Then they discuss how they score with each other until all of them are within +/- 5 percentage points of the same result.

After covering calibration during lecture, the QARs simulated a calibration session. Five calls were evaluated. Calls one, two, and four went well. All the QARs scored each one a perfect score of 100 percent. The third and fifth calls were deliberately set up to not turn out well. There was noticeable variation in the QARs scores for these two calls.

For call three, four of the scores were 47, 51, 60, and 60 percent. The minimum acceptable score is 85 percent. For call five, five of the scores were 63, 66, 72, 76, and 83 percent. The QARs discussed how to narrow the variation in their scores. The instructor closed out her portion of the training in the same personal and enthusiastic manner she had demonstrated throughout.

The section on constructive feedback began with an exercise. The QARs were asked to relate personal stories about when they had to give feedback. They were asked about what the goals and difficulties were. All the QARs shared stories freely. All appeared to agree on the importance of constructive feedback.

The section on communicating observations contained many useful hints: be concise, focus on the behavior, emphasize how everyone is working toward the same goal, and use specific examples. There appeared to be adequate time for this exercise. The trainees received a very valuable hint. They were told to not let the agent control the discussion about what could have been improved. The QAR should be the first to cover this subject in order to keep the discussion on track.

The discussion of behavior needs to be linked to the goals of TQA and should be restricted to the most important effects. To insure the discussion is not one way, the QAR should prompt the agent for a response by pausing, looking the agent in the eye, or by direct request. Key points should be checked to make sure the agent understands them. The agent does not have to agree with the points in order for feedback to have value.

To reach agreement on what to do for follow up, the QAR should put the burden of coming up with a solution on the agent. The QAR can offer alternatives such as additional training. The QAR should repeat the need for change, stay calm, and ask the agent directly for a solution.

Feedback does not have to be limited to call monitoring. The QAR can offer praise and suggestions between monitoring sessions. This is a good idea.

Profanity, abrupt hang ups by the agent, and data falsification should not be broached by the QAR. The QAR should bring these issues to the attention of the agent's supervisor for action.

The lecture on communicating observations was followed by a simulation of call monitoring. The call scripts were combined with the hardware and software the QARs will use on the job. Trainees took turns being agents or QARs. All the trainees participated, and they tried hard to make it real. They completed the exercise with enthusiasm.

At the end of day three, the trainees were asked for their thoughts. They said the training materials were user friendly. The work book was well organized and useful as a reference. Also, the AutoFocus software was user friendly and taught in a well paced, comprehensive manner. All the trainees agreed they understood the role of a QAR.

In particular, they liked the addition of the exercise on calibration. Some specific remarks on this were (1) the suggestion to go by the caller's reaction in judging a call was a useful one, (2) there was the right amount of practice exercise for calibration, and (3) there should be more practice calls of intermediate quality. The trainees felt the present set of calls either demonstrated perfect success or perfect failure. Calls that are more in between would present more of a challenge in scoring.

The reception of the ReachOut software, the product which allows the QARs to patch into the agents' calls, was mixed. There were several system errors. Looking at the ReachOut panel and the AutoFocus panel at the same time on the same screen was confusing at first. It did not seem a smooth process. The PRC people intervened as appropriate to clear up the problems.

One of the trainees commented that she did not fill out the items on the evaluation screen in the same order they appeared. Some items could not be filled out until the call was over. She would like the evaluation screen to list the score items in a more natural order.

The fourth day of class was devoted completely to additional practice in monitoring calls. On the third day, the practice was implemented by having the trainees read call scripts. The fourth day was set up so the trainees could patch into NPC operators simulating actual calls over the phone.

There was a delay in starting the practice while the phones and computers were hooked up. After this an excellent series of test calls followed. A sample of four calls was selected for observation. The QAR filled out the evaluation screen promptly, smoothly, and correctly.

The test calls were challenging. People in some cases did not like being read the same script over and over. The agents are provided with a standard explanation to use in the event a caller expresses frustration with this. In one case, the caller wanted to be mailed a form past the date when this was possible. One agent could not answer a caller's question about how to treat children of joint custody for residence purposes. Another caller was concerned about why the Census Bureau could not obtain the information it wanted from the IRS. The OSS did not provide an answer. Here was an opportunity for the agent to apologize for repeating the same response.

After scoring some "live" calls, the trainees provided additional feedback.

- (1) How should an agent be scored who has trouble finding the right answer but eventually locates it in the OSS? This issue should be covered in QAR training.
- (2) In a feedback session, will the QAR have access to the OSS so the agent can be shown where they should have gone to find an answer?
- (3) Should callers be considered satisfied if they discontinue the call out of obvious dislike of hearing the same response over and over?
- (4) The simultaneous display of AutoFocus and ReachOut was not a problem after a while.
- (5) Why can't an evaluation report be printed directly from the submit screen. The QAR has to go through the review screen module first.
- (6) The system should display the total score before submitting a report.
- (7) Is feedback expected after each call in the 45 minute monitoring period, or should it be delayed until the conclusion of the monitoring period?
- (8) Four hours of practice with "live" calls is enough.

DSCMO thanked the trainees for the feedback and made notes on how to incorporate them into the next version of the training.

The first real QAR training class is scheduled for January 2000.

III. CONCLUSIONS

The lectures and exercises for the QAR training are well organized and comprehensive. Some more work is needed to make the ReachOut software easier to set up on the computers. PRC is aware of this need. The trainees' questions and suggestions will provide improvements to the class. DSCMO is starting to implement them. The material on calibration sessions should be retained. The set of "live" practice calls works well and should be retained.

cc:

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